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METRO

Magazine

a bi-monthly publication

serving surface mass transportation for 40 years

1989-1990 Special Edition

\$25

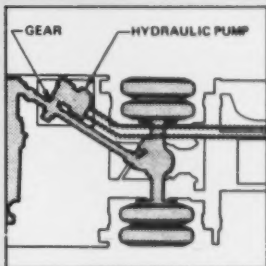
FACT BOOK

Bus & Chassis Manufacturers
Component & Service Suppliers
Trailer Manufacturers
Consultants & Industry Statistics

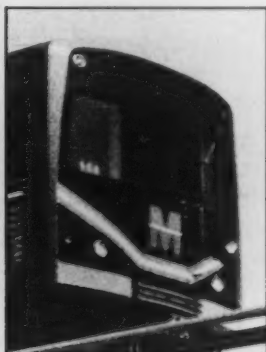
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Bus p. 21



Components p. 47



Railcar p. 89

Cover:
Design by
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Annual Fact Book 1989-90

(Published in the Fall Quarter)

Features

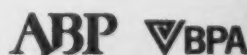
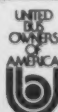
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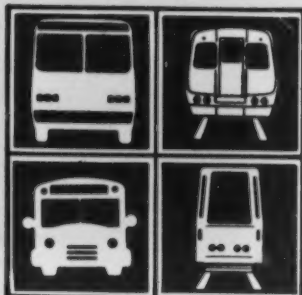
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Statistics



Personal Consumption Expenditures For Transportation in 1988 (in Millions)

User-Operated Transportation

New Automobiles	\$101,168
Used Automobiles	37,480
New and used trucks, RV's	39,272
All other auto expenses including insurance, fuel, repair, parking, etc.	<u>191,226</u>
Total Purchased User-Operated	<u>\$369,146</u>

Purchased Local Transportation

Transit	\$ 3,846
Taxicabs	3,829
Railway Commutation	<u>656</u>
Total Purchased Local Transportation	<u>\$ 8,331</u>

Purchased Intercity Transportation

Railway Excluding Commutation	\$ 825
Intercity Bus	1,222
Airline	22,588
Other	<u>2,376</u>
Total Purchased Intercity Transportation	<u>\$ 27,011</u>
Total Transportation	<u>\$404,488</u>

Source: U.S. Department of Commerce, Bureau of Analysis

Expenditures for new automobiles jumped over the \$100 billion mark in 1988, increasing eight percent over 1987's record. Transit's share of total expenditures for transportation, including bus and rail transit, commuter railway, and intercity bus amount to about one percent of the total transportation expenditures in the U.S. By contrast, expenditures for new automobiles alone amounted to 25 percent, while expenditures for airline travel amounted to six percent.

Statistics



Modal Statistics At A Glance

MODE	NUMBER OF SYSTEMS	ACTIVE VEHICLES	OPERATING EMPLOYEES	VEHICLE MILES OPERATED (MILLIONS)	UNLINKED PASSENGER TRIPS (MILLIONS)	PASSENGER MILES (MILLIONS)
Motor Bus	2,671	60,388	153,533	1,866.0	5,754	21,332
Urbanized Area Fixed-Route	751	52,716	138,119	1,750.4	5,541	20,605
Other Fixed-Route	1,920	7,672	15,434	115.6	213	727
Demand Response	2,582	18,190	29,445	381.5	96	601
Vanpool	23	940	N/A	N/A	N/A	N/A
Heavy Rail	12	10,539	46,269	517.3	2,321	11,365
Light Rail	15	831	3,930	20.8	154	471
Trolleybus	5	710	2032	14.7	136	211
Commuter Railroad	12	4,649	22,603	201.2	325	6,941
Ferry Boat	23	88	2,807	1.9	49	274
Other*	11	155	577	16.8	38	182
Subtotal	5,036	96,490	261,216	3,020.6 (Total motorbus equivalent miles 3,807.1)	8,867	41,377
School Bus	10,000+	361,998	N/A	3,690.9	9,600	N/A
Total	15,036	458,488	261,216 **	7,498.0	18,467	41,377**

Transit modal statistics usually report on the well known transit modes such as motorbus, light and heavy rail, vanpool, etc. Typically left out of the data are school bus statistics. Yet school buses provide more child-rides (a term roughly equivalent to unlinked passenger trips), than what is popularly known as "public transit." With states and localities increasingly providing a greater and greater amount of funding for public transit, school bus transportation should be routinely reported modally as this particular segment of "public" transportation is entirely state and locally funded.

*Includes cable car, inclined plane, aerial tramway, vanpool and automated guideway.

**School bus data not included in these column totals

Source: APTA 1989 Fact Book
School Bus Fleet Magazine

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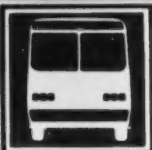
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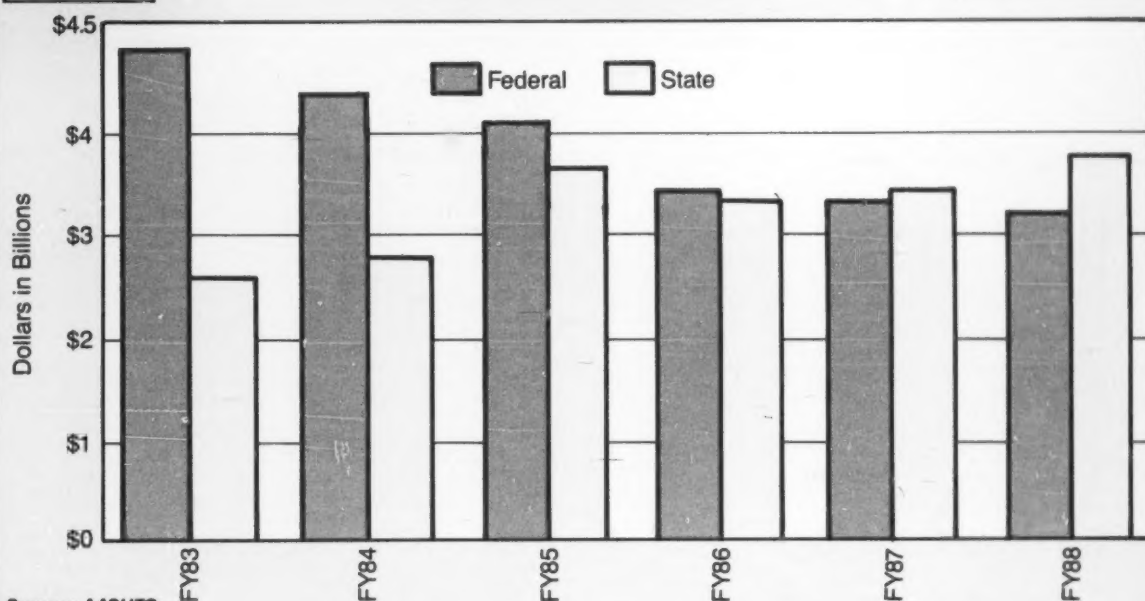
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Statistics

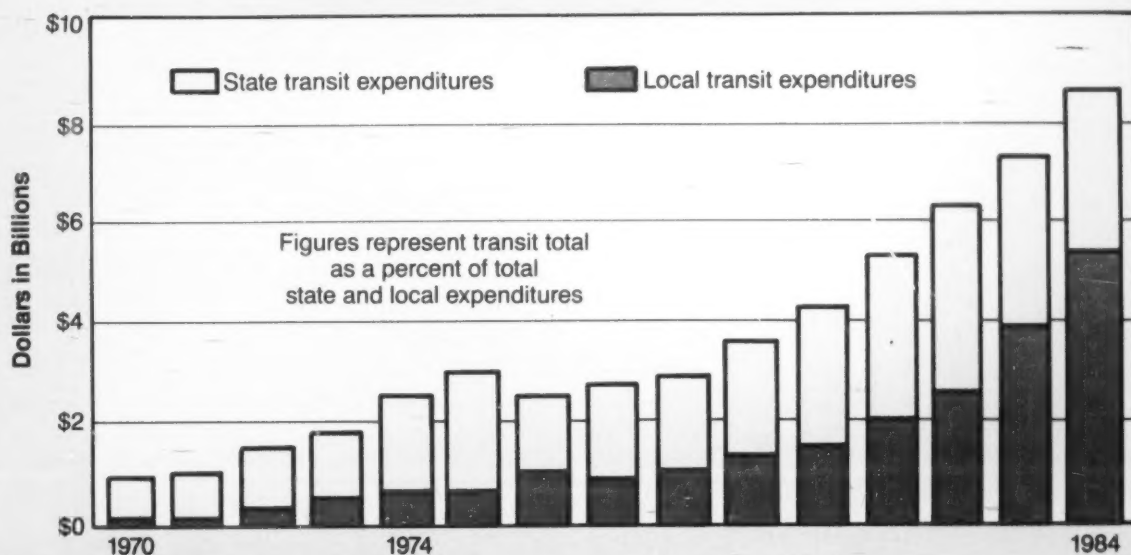


State Vs. Federal Expenditures For Public Transit



Source: AASHTO

State and Local Expenditures on Public Transit and Their Share of Total State and Local Expenditures, 1970-1984

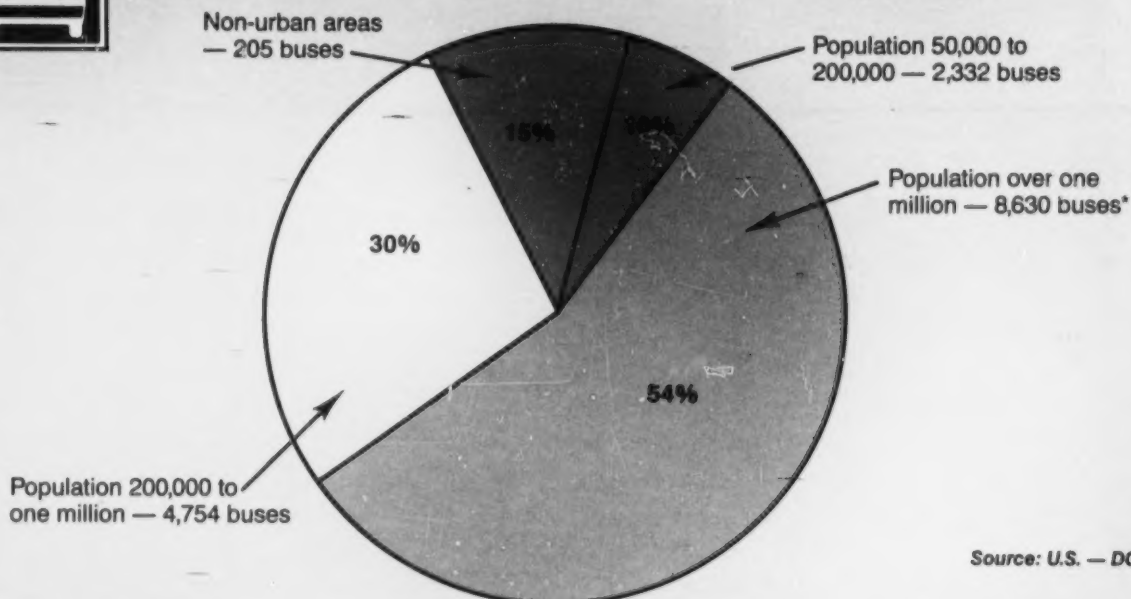


Source: Survey of Current Business

Statistics



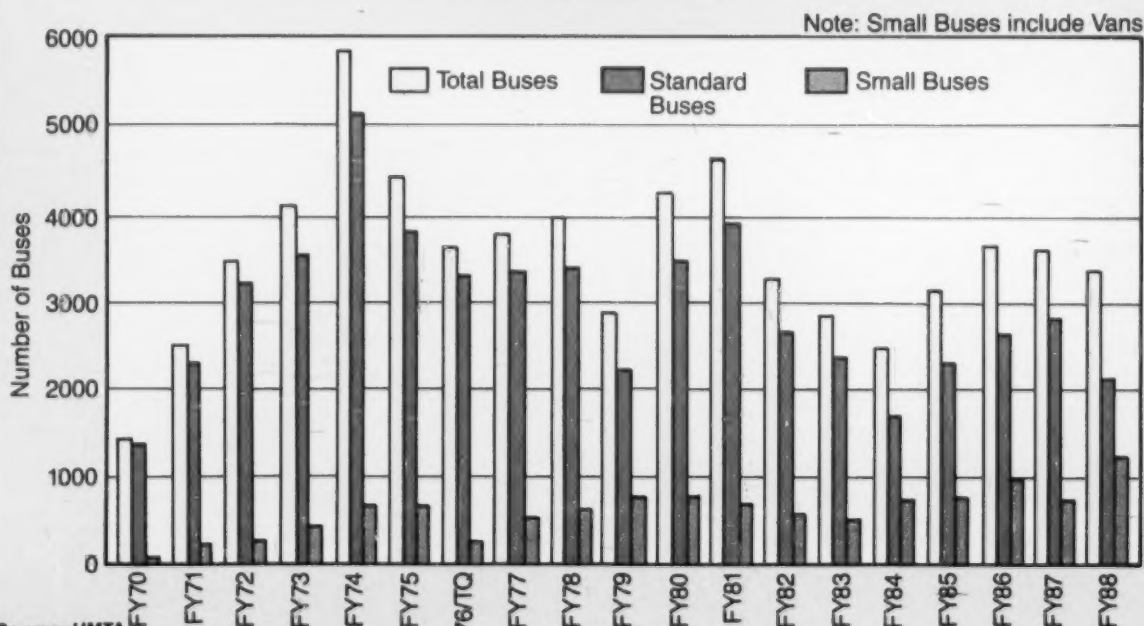
Buses Purchased With Discretionary and Formula Funds for all Urbanized Areas FY84 through FY88



Source: U.S. — DOT

* During the same four fiscal years the 32 largest urbanized areas also received \$762,588,771 in discretionary and formula funds for bus maintenance facilities.

Bus Commitments (Section 16(b)(2) and Section 18 not included) FY70 — FY88



Source: UMTA

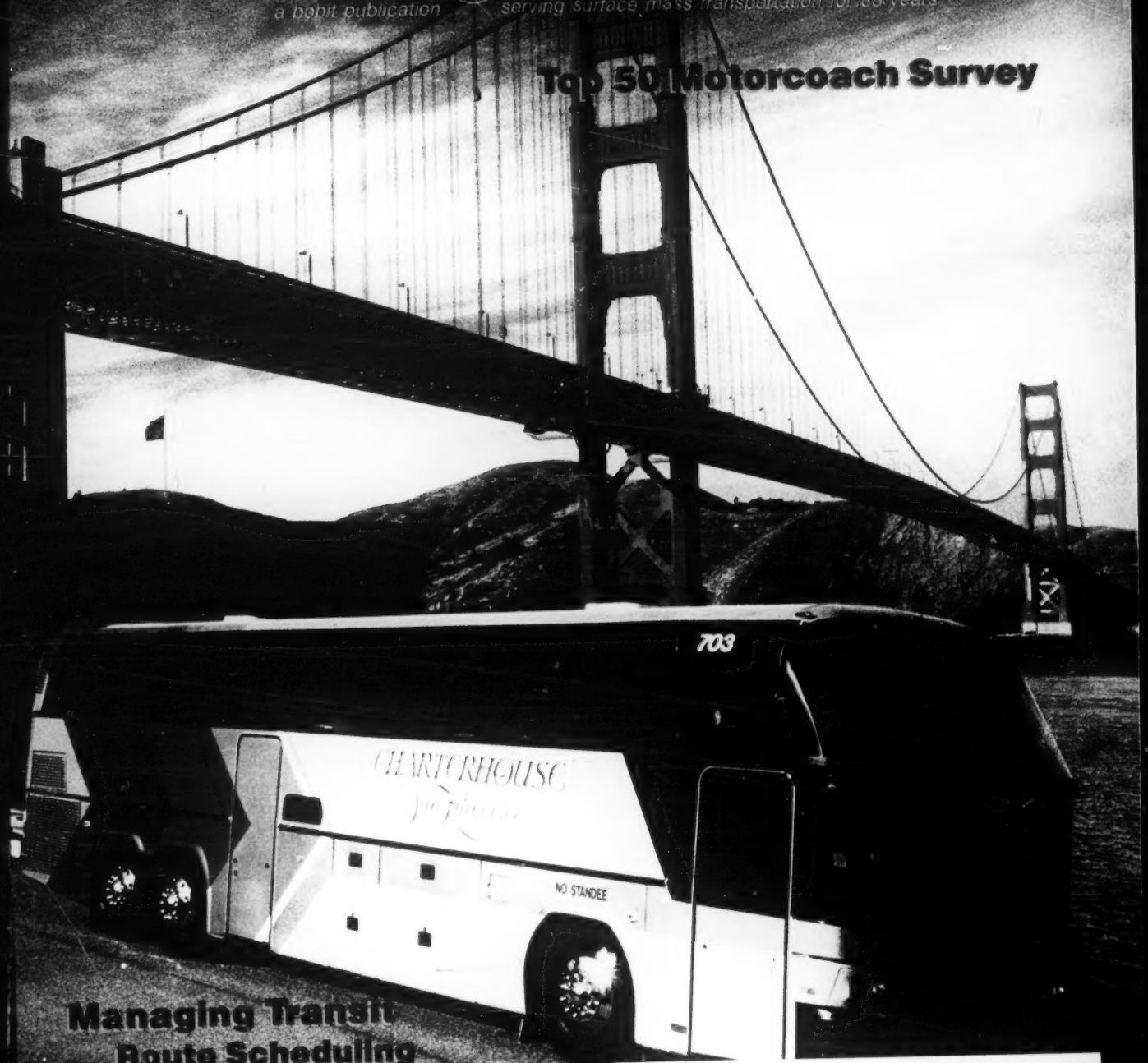
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Top 50 Motorcoach Survey



**Managing Transit
Route Scheduling**

**The Motorcoach Industry
Year-In-Review**

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January/February 1990



Motorcoach p. 20

Total	Ow ned	Leased
3,850	1,368	2,482
420	400	20
370	231	139

Top 50 p. 26

**INTERNATIONAL
PUBLIC
TRANSIT
EXPO..**

'90

Expo p. 62

*On the cover: Neoplan
Cityliner Photo cour-
tesy of Charterhouse of
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Features

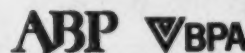
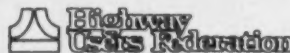
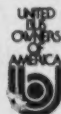
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METRO'S Top 50 Motorcoach Fleets

METRO's third annual survey of private carriers in North America.

By Jody L. Bush

METRO Magazine traditionally kicks off the New Year with the Charter Operator's January/February issue. The survey of the 50 Largest Motorcoach Fleets, a regular feature of this annual issue, reflects some of the changes coursing through the motorcoach industry.

For the third year running, and likely for the foreseeable future, Greyhound Lines of Dallas, Texas, qualified for the number one spot. The company reported 90 additional buses in its fleet. Greyhound increased the number of coaches it leased but decreased the number of coaches it owned — most likely because of the common ownership of Greyhound Lines and Bus Lease by GLI Holding Ltd.

The survey included companies that responded to a questionnaire sent by METRO editors or were contacted by telephone. Some data was acquired through other independent means. Because end-of-the-year figures would not become available until late December, the statistics cited are figures which run through the end of November or early December.

This does not affect the total number of motorcoaches owned or leased, but it is an approximation of the total revenue miles operated and the passengers carried for 1989.

On the average, the number of motorcoaches in service remained relatively the same and indicated growth and decline among some of the companies listed in last year's survey.

For instance, Robert's Hawaii Inc., increased it's fleet size to 377

in 1989 from 199 motorcoaches in 1988; Robert's advanced to the number four spot this year from number eight a year ago.

Greyline of Florida moved to position eight from number 13 increasing it's fleet from 155 buses to 191.

Arrow Stage Line of Sioux City, Iowa, also reported strong growth for 1989. The company garnered the number 21 spot on the survey with 100 buses.

Some operators are new to the METRO Top 50 survey. Atlantic Express Coachways made the list this year with 75 motorcoaches.

Starline Tours with 171 coaches, American Sightseeing with 118, and Trans-Bridge with 47 coaches participated.

Altogether, 12 new companies were included in this year's survey.

It also reflects consolidations among operators and the companies, most notably Jefferson Transportation, that have filed for bankruptcy.

As expected, the tour and charter business reflected growth in 1989; a consistent growth rate for the past three years. Operators credited the strong Asian and European tourist business that has surfaced in the American market. This segment of the industry is expected to continue the upward trend.

Dan Dipert, past president of the National Tour Association, said, "The tour industry has grown approximately 6 to 8 percent a year." However, he added, "There aren't any major events planned for 1990." Typically, major events are a significant factor in the growth of the tour and charter industry for a given year.

Contrasting opinions as to the

state of the industry for the new decade surfaced. Industry professionals voiced concern over increased environmental pressures to redesign engines to meet stringent emission standards, the handicap accessibility issue and erosion among smaller motorcoach operators (see "Motorcoach Industry Faces New Challenges," page 20).

Motorcoach operators face the prospect of losing up to a third of their revenue-producing seats, depending on how the accessibility legislation turns out. If that development occurs, some predict there won't be enough private bus companies left to make anyone's survey.

Nearly all segments of the motorcoach industry are moving in a new direction. According to Vern Tull, executive vice president of Eagle Bus Manufacturing, "we are all headed in a styling change." The European motorcoach has inspired domestic manufacturers to incorporate more sophisticated design styles in their buses.

Judging from the survey, the industry did not experience dramatic changes in 1989, and although coach operators and manufacturers would like to be optimistic in the new decade, a sense of unease better describes the future of the motorcoach industry.

METRO editors will continue to explore the motorcoach industry with the 1991 Top 50 survey. If your company was left out of the listing and would like to participate next year, and operates more than 40 buses, please send a note to that effect to the editors. Send your information to: Top 50 Motorcoach Survey, c/o METRO Magazine, 2512 Artesia Blvd., Redondo Beach, CA 90278.

Largest 50 Private Operators

RANK 1990	1989	CARRIER, CITY, STATE	FLEET MIX/SIZE			PASSENGERS PER YEAR	REVENUE MILES OPERATED
			Total	Owned	Leased		
1	1	Greyhound Lines Dallas, TX	3,940	1,280	2,660	21 mil	368.8 mil
2	2	Academy Lines, Inc. Hoboken, NJ	134	299	165	13.1 mil	34.3 mil
3	—	Greyhound Lines of Canada Calgary, AB	425	425	0	5 mil +	N/A
4	3	Robert & Robert Inc. Horseshoe, NJ	381	377	4	1 mil	5 mil
5	4	Voyageur Enterprises, Ltd. Montreal, Quebec	324	N/A	N/A	N/A	N/A
6	5	Suburban Transit Corp. New Brunswick, NJ	281	150	111	9.8 mil	11.7 mil
7	5	Shortline Companies Mahwah, NJ	236	14	250	N/A	N/A
8	12	Gray Line of Ft. Lauderdale Ft. Lauderdale, FL	191	191	0	N/A	7.3 mil
9	11	Rockland Coaches, Inc. Bergenfield, NJ	182	19	163	5.9 mil	6.6 mil
10	—	Stanine Tours Hollywood, CA	170	N/A	N/A	3 mil	2 mil
11	9	New York Bus Service Bronx, NY	150	150	0	4 mil	6 mil
12	14	Westours Motor Coaches, Inc. Seattle, WA	142	142	0	400,000	1.6 mil



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Largest 50 Private Operators *continued*

RANK 1990	1989	CARRIER, CITY, STATE	FLEET MIX/SIZE			PASSENGERS PER YEAR	REVENUE MILES OPERATED
			Total	Owned	Leased		
26	—	K-T Contract Service Inc. Las Vegas, NV	83	42	41	N/A	N/A
27	28	Golden Bus Lines Mendota, NJ	82	78	4	N/A	N/A
28	32	Keeshin Charter Service Chicago, IL	82	68	14	N/A	975,000
29	29	Frank Marc Coach Company Wilkes-Barre, PA	79	79	0	N/A	5 mil
30	—	Atlantic Express Coachways Cinnaminson, NJ	75	75	0	1.2 mil	6 mil
31	31	TNM&O Coaches, Inc. Lubbock, TX	70	70	0	220,501	6.4 mil
32	—	McGill Inc. Carolina American Asheboro, NC	64	60	4	170,000	1.8 mil
33	—	Mark IV Charter Lines Inc. Gardena, CA	63	56	7	3.1 mil	1.2 mil
34	34	Carl R. Bieber Inc. Kutztown, PA	62	62	0	579,178	3.4 mil
35	29	Shoup Buses Inc. Middlebury, IN	60	60	0	644,560	5 mil
36	18	Blue & White Lines Inc. Altoona, PA	60	60	0	600,000	4.5 mil
37	35	Bonanza Bus Lines Inc. Providence, RI	57	57	0	1.8 mil	5.9 mil

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RANK 1990 1989	CARRIER CITY STATE	FLEET MIX/SIZE			PASSENGERS PER YEAR	REVENUE MILES OPERATED
		Total	Owned	Leased		
38 42	Vermont Transit Co. Inc. Burlington, VT	54	50	4	480,000	4.6 mil
39 43	Eyre Bus Service Inc. Glenview, MD	50	50	0	N/A	2.5 mil
40 —	Trans-Bridge Lines Inc. Bethlehem, PA	47	36	11	479,000	3.7 mil
41 —	Star Tours Trenton, NJ	46	46	0	220,096	2 mil
42 47	Capitol Bus Company Harrisburg, PA	45	43	2	469,000	3.7 mil
43 44	Royal Coach Tours San Jose, CA	41	41	0	180,000	1.5 mil
44 —	Indian Trails Inc. Owosso, MI	41	36	5	304,000	2.7 mil
45 45	Ray & Ross Transport Inc. Las Vegas, NV	40	40	0	320,000	3.5 mil
46 50	Orange Belt States Visalia, CA	40	40	0	400,000	2.4 mil
47 49	Coach Travel Unlimited Corp. South Holland, IL	37	0	37	156,257	1.8 mil
48 38	Peerless Stages Inc. Oakland, CA	35	35	0	81,000	1.3 mil
49 40	Gray Lines Tours Co. Los Angeles, CA	30	30	0	350,000	3.5 mil
50 —	River Trails Transit Lines Inc. Galena, IL	30	30	0	N/A	2 mil

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March / April 1990

Features



Wheelchair lifts p. 24



UBOA/ABA Expo p. 50



Prevost H3-40 p. 46

On the cover: Prevost H3-40
Photo by Bob Redden

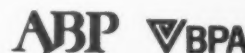
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customer service business if the managers are too far from the customers "you're in deep trouble." Greyhound has removed some layers, he said, and the company "is as flat as it can be."

The plan to subcontract linehaul routes "has no market risk" for the subcontractor, Currey said, and "only a limited investment risk." He said the subcontractor runs the miles, manages the employees and provides the buses, owned or leased. He said the plan "is very much like a private company privatizing itself."

Meanwhile, all of Greyhound's drivers went out on strike March 2 as METRO was going to press.

A federal mediator had been called in to try to settle the contract dispute between Greyhound Lines and the Amalgamated Transit Union (ATU), which represents about 10,000 Greyhound employees including all its drivers.

The present contract was to have expired March 1. The ATU had previously authorized a strike for March 2 if

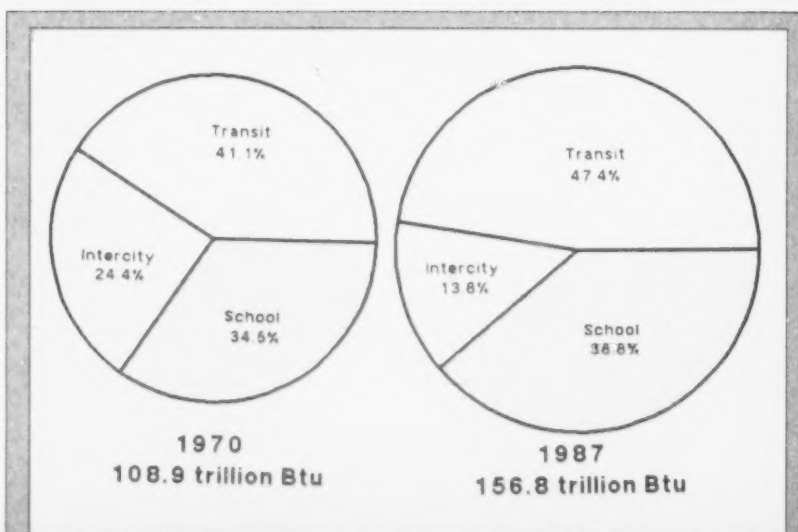


Fred Curry

contract negotiations were not progressing satisfactorily. The company had made what it called its final offer, a complicated raise-incentive package. The union wants substantially more raises over three years.

In anticipation of a strike, Greyhound had taken several steps including hiring new drivers and trying to subcontract out some of its linehaul routes.

Greyhound was still trying to hire drivers to have them ready in the event of a strike, said Jeanne Fry, a Greyhound



Graphs show energy consumption by type of bus in 1970 and 1987, according to the Transportation Energy Data Book.

School Buses Lead In Energy Efficiency

School buses are more energy efficient than either intercity or transit buses based on Btu's per vehicle mile, according to the *Transportation Energy Data Book*.

The book, published in the fall, said school buses were more than twice as efficient as transit buses. The book's 10th edition was prepared for the Department of Energy by Oak Ridge National Laboratory in Oak Ridge, Tenn.

It noted that school and non-revenue buses traveled 3,700 million vehicle miles in 1986, more than double the travel of transit or intercity buses. In 1970 school buses traveled 2,100 million vehicle miles, the book said, and in 1980 2,900 million vehicle miles.

It said that of all types of buses in operation, only transit buses did not have energy efficiency improvement between 1982 and 1987.

Statistics in the book show that 486,753 school and other non-revenue (some industrial and other private) buses were in operation in 1987, up from 288,700 in 1970 and 418,255 in 1980. That compares with 57,687 motor buses and 20,400 intercity buses in 1987. It noted that school and non-revenue buses accounted for 81 percent of all buses in operation in the United States in 1987.

Stacy C. Davis, one of the book's four authors, said she hopes to include data comparing use of alternative fuels in the next edition of the book.

public relations spokesperson. They would have to qualify, she said, but "many are ready." She also said contracts would not be signed with route subcontractors until a strike, "but we know who to see."

Electric Road System Planned

Southern California Edison (SCE) has developed an electric road system demonstration project in the Playa Vista community in Los Angeles County that will study the interaction between ve-

hicles and electric transportation.

The \$2 million project is jointly funded by SCE and the Los Angeles Department of Water and Power (LADWP). "The objectives of the program are to accelerate the development of advanced clean air transportation," said Melanie Savage, a spokeswoman for SCE.

Maguire-Thomas Partners, the primary developer for the Playa Vista community, donated the site to examine the benefits of electric road systems for other communities. The electric road system will cover 1,000 of the 5,000 feet of roadbed in the community. Edison